Helpdesk triage

Triage **1.1**: A work-in-progress triage protocol

Rob Gardner • University of Chicago

OSG User Support and Campus Grids meeting
August 11, 2015

Open Science Grid

1.1 Update and weekly summary

- Big reduction in Overdue category!
  - 10 ➜ 1 this past week

Ticket summary

Overdue	Open	On Hold	Due Today	Unassigned
1	10	16	1	0

- Also 21 Open down to 10
- There were no incidents of tickets unanswered

Tickets resolved by agent

Agent ticket summary

3 Aug, 2015 - 9 Aug, 2015

Agent	Tickets Resolved	On Time Resolution	First Contact Resolution	Average First Response Time	Average Response Time	Average Resolution Time
Bala Desinghu	8	75% (6)	37% (3)	1 hours 29 minutes	1 hours 18 minutes	1 days 2 hours
David Champion	3	100% (3)	66% (2)	2 hours 53 minutes	1 second	1 days 4 hours
Emelie Harstad	0	- (0)	- (0)	1 second	1 second	1 second
Lincoln Bryant	2	0% (0)	50% (1)	1 second	1 minutes 39 seconds	3 days 18 hours
Mats Rynge	3	66% (2)	66% (2)	14 hours 0 minutes	13 hours 21 minutes	19 hours 28 minutes
Rob Gardner	2	100% (2)	100% (2)	3 hours 26 minutes	20 minutes 57 seconds	20 minutes 56 seconds
Suchandra Thapa	1	100% (1)	100% (1)	53 minutes 56 seconds	50 minutes 43 seconds	50 minutes 47 seconds
Unassigned	0	- (0)	- (0)	1 second	1 second	1 second

All Reports / Report View   ⬇ Download as PDF

Helpdesk At A Glance
3 Aug, 2015 - 9 Aug, 2015

Note: This report shows data after Mon, 1 Apr, 2013 at 12:00 AM

View classic report

Edit   Filtered by: Time Period : **3 Aug, 2015 - 9 Aug, 2015**

Unsaved Report

Summary   ?

18	19	52	02:44	04:18	28:09
▲ 50.00%	▲ 1800.00%	▲ 92.59%	▼ 34.99%	▼ 34.99%	▲ 3912.43%
RECEIVED TICKETS	RESOLVED TICKETS	BACKLOG TICKETS	AVERAGE RESPONSE TIME (IN HRS)	AVERAGE FIRST RESPONSE TIME (IN HRS)	AVERAGE RESOLUTION TIME (IN HRS)

2.1	2.5	2	5	73%	57%
▲ 105.26%	▲		▲ 400.00%	▼ 26.32%	▼ 42.11%
AVERAGE CUSTOMER INTERACTIONS	AVERAGE AGENT INTERACTIONS	NUM. OF REOPENS	NUM. OF REASSIGNS	SLA %	FCR %

Tickets By Source   ?

■ Twitter   ■ Phone   ■ Portal   ■ Email

16.7 %	5.6 %	77.8 %

Tickets By Priority

- Low
- Medium
- High
- Urgent

5.6 %
5.6 %
22.2 %
66.7 %

Tickets By Type

14.3 %
14.3 %
14.3 %
14.3 %
14.3 %
28.6 %
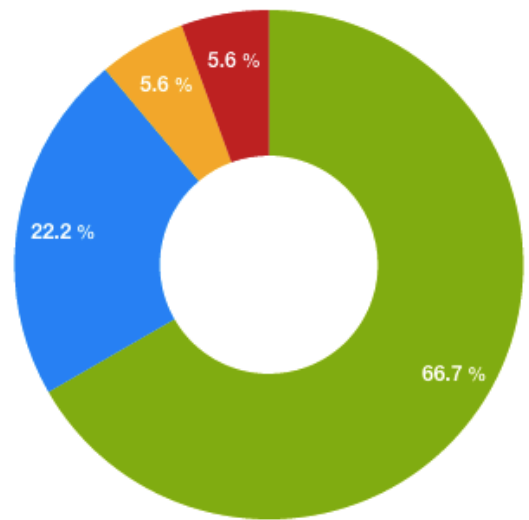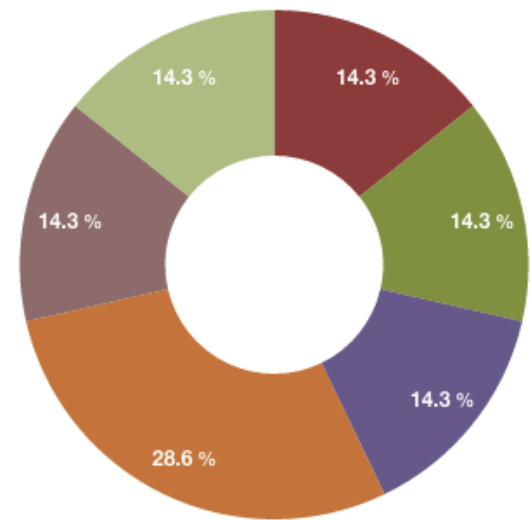
- Feature Request
- Incident
- Job execution
- Job submission or workflow
- Other
- Problem
- Question
- Software
- Software request

▲ 2/2 ▼

Feedback for the week

No feedback given

Feedback last 90 days

Some of this is internal - testing

Positive remarks from from real users
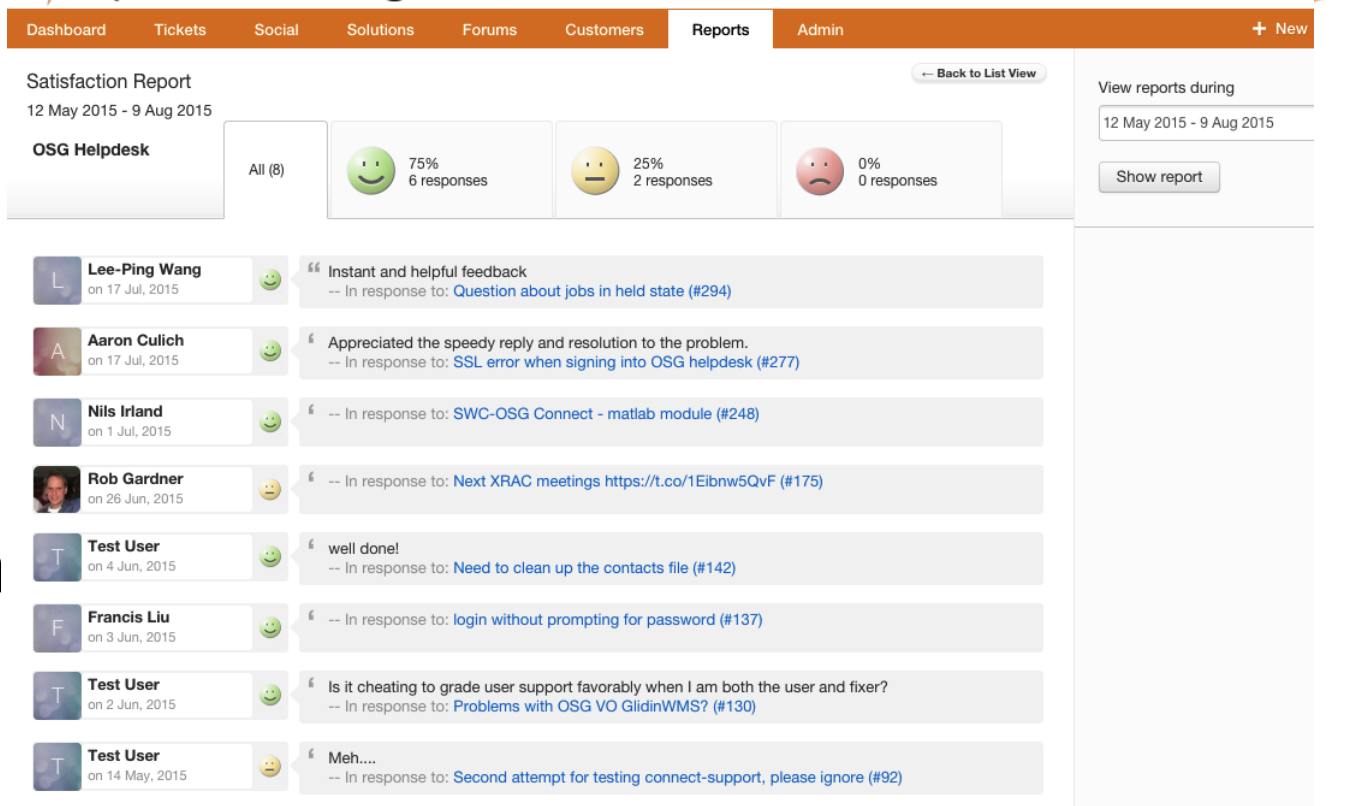
Triage of open tickets

due later

due sooner

Open tickets
Sorted by **Due by time**

Pick Up | Assign to Agent | Close | Bulk Actions | Merge | Flag Spam | Delete | Export

set up grid job #319
From: Fernando Luco (Texas A & M University)
Customer responded: 7 days ago, Due in 18 days
CUSTOMER RESPONDED
Agent: Bala Desinghu
Status: Open
Priority: Medium

molecular simulations #381
From: Balamurugan Desinghu
Created: about 7 hours ago, Due in 9 days
NEW
Agent: Bala Desinghu
Status: Open
Priority: Low

osgconnect.net log out does not clear access_token cookie #287
From: Jim Basney
Agent responded: 6 days ago, Due in 8 days
Agent: David Champion
Status: Open
Priority: Medium

OrthoMCL installation #339
From: Sucheta Tripathy
Customer responded: 2 days ago, Due in 3 days
CUSTOMER RESPONDED
Agent: Suchandra Tha...
Status: Open
Priority: Medium

Test xenon1t montecarlo on OSG #382
From: Test User
Created: about 5 hours ago, Due in 2 days
NEW
Agent: Rob Gardner
Status: Open
Priority: High

Fwd: xenon1t montecarlo on midway and osg #383
From: Test User
Created: about 5 hours ago, Due in 2 days
NEW
Agent: Suchandra Tha...
Status: Open
Priority: High

Software installations in OASIS #321
From: Mario Guevara (University of Delaware)
Agent responded: 3 days ago, Due in 1 day
Agent: Suchandra Tha...
Status: Open
Priority: Urgent

Fwd: OSG and Palmetto #345
From: Barr Von Oehsen
Customer responded: about 5 hours ago, Due in 1 day
CUSTOMER RESPONDED
Agent: David Champion
Status: Open
Priority: High

work groups #331
From: Wim.cardoen
Customer responded: 5 days ago, Due in about 14 hours
CUSTOMER RESPONDED
Agent: Bala Desinghu
Status: Open
Priority: Low

Re: Contact for CI Connect? #284
From: Runesha
Customer responded: 26 days ago, Overdue by about 6 hours
CUSTOMER RESPONDED
Agent: David Champion
Status: Open
Priority: High

Summary of Triage Management

- Order of triage (unchanged)
  - New, unassigned ➜ assign, and make reasonable estimate for due date/time
  - Overdue (+ Due today)
    - Ping agent
  - Open ➜ order by due date
  - On hold:
    - Order by due date & inspect
    - Check to see if customer needs a ping
    - Or if we have an action

Background

- As the helpdesk grows in usage, we need to make sure users don't fall through the cracks, or that tickets languish unnecessarily
- Our goal is to be the Zappos of computing when it comes to customer service
  - we go above and beyond to help users
  - we're not satisfied till they're satisfied
  - we incorporate lessons and best practices into our KB in the form of "topics" - i.e. "how-to" do things

Triage principles

- We have no black holes of support
  - Every single issue is processed
- We **always respond** within a business day, to either new requests or a user response
  - the response may even be a simple acknowledgement
- We do not have a perfect system now, but we strive to improve

  - So there will be changes: the system today will not be the system tomorrow, but we'll converge

Triage principles

- Someone is always responsible for triage
  - Rotate across team on weekly basis
- Triage manager responsible for keeping state
  - Open - New
  - Open - Waiting on Customer
  - Open - Waiting on third party
  - Open - Response due
  - Open - Customer responded
  - Overdue, On Hold, Unassigned
  - Resolved, Closed

Triage principles

- There should be no Overdue issues at CoB
- There should be no "Customer Responded" issues at CoB
  - Agents, not the Triage manager, are responsible for updating status and thefore are responsible for keeping issues out of these categories

Triage manager actions

- Go to the **dashboard** first thing

opensciencegrid help desk OSG Helpdesk

Dashboard | Tickets | Social | Solutions | Forums | Customers | Reports | Admin | + New | Search

Ticket summary

Overdue	Open	On Hold	Due Today	Unassigned
10	21	7	0	2

Recent Activity

David Champion updated due date of Article Feedback - Add a non-tutorial document to the knowledge base (#302) to Wed, 5 Aug, 11:59 PM
a minute ago

David Champion added a note to the ticket Article Feedback - Add a non-tutorial document to the knowledge base (#302)
a minute ago

Camille Garcia-Ramos sent an email response to the ticket Installing FSL in OASIS (#333)
9 minutes ago

Bala Desinghu updated ticket status of Request for installation of Blast database (#330) to Resolved
26 minutes ago

Bala Desinghu updated ticket status of Data transfer examples for user school (#307) to Resolved
26 minutes ago

Bala Desinghu updated ticket status of long running jobs (#341) to Resolved
27 minutes ago

Bala Desinghu has sent a reply to the ticket long running jobs (#341)
28 minutes ago

To-Do

☐ https://opensciencegrid.insight.ly/op portunities/details/7214175
Re: Resource Provider

Add To do

Available Quests   See all

Earn Customer Love!
Resolve 10 tickets in a week with Customer Satisfaction rating of Awesome and unlock the "Heart" badge and get 200 Bonus points!
200

Participate in Forums!
Answer 10 forum posts in a week to unlock the "Commentor" Badge and earn 200 Bonus points!
200

Pick Up | Assign to Age... | ... Actions | Merge | Flag Spam | Delete | Export

OSG Connect jobs #342
From: Lincoln Bryant
Created: about 1 hour ago, Due in 9 days
NEW
Agent: -
Status: Open
Priority: Low

I am unable to change my password in osgconnect #340
From: Sucheta Tripathy
Customer responded: about 19 hours ago, Due in 8 days
CUSTOMER RESPONDED
Agent: David Champion
Status: Open
Priority: Low

OrthoMCL installation #339
From: Sucheta Tripathy
Customer responded: about 20 hours ago, Due in 7 days
CUSTOMER RESPONDED
Agent: Suchandra Tha...
Status: Open
Priority: Low

ask for installing elastix #335
From: Tingtingzhaopku
Agent responded: 1 day ago, Due in 7 days
Agent: Bala Desinghu
Status: Open
Priority: Low

Installing FSL in OASIS #333
From: Camille Garcia-Ramos
Customer responded: 10 minutes ago, Due in 8 days
CUSTOMER RESPONDED
Agent: Bala Desinghu
Status: Open
Priority: Low

work groups #331
From: Wim.cardoen
Agent responded: about 2 hours ago, Due in 7 days
Agent: Bala Desinghu
Status: Open
Priority: Low

Contact with UChicago #323
From: David Champion
Created: 5 days ago, Due in 6 days
RESPONSE DUE
Agent: -
Status: Open
Priority: Low

Software installations in OASIS #321
From: Mario Guevara (University of Delaware)
Agent responded: 4 days ago, Due in 1 day
Agent: Bala Desinghu
Status: Open
Priority: Medium

set up grid job #319
From: Fernando Luco (Texas A & M University)
Customer responded: about 17 hours ago, Due in 2 days
CUSTOMER RESPONDED
Agent: Bala Desinghu
Status: Open
Priority: Low

held jobs #317
From: Bing Xie (Illinois Institute of Technology)
Agent responded: 4 days ago, Overdue by 7 days
OVERDUE
Agent: Bala Desinghu
Status: Open
Priority: High

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introduction #316
OVERDUE
due by 4 days
Agent: Suchandra Tha...
Status: Open
Priority: Medium

...o, Due in 2 days
Agent: Bala Desinghu
Status: Open
Priority: Medium

/ina #303
OVERDUE
7 days
Agent: Bala Desinghu
Status: Open
Priority: Low

tutorial document to the k
RESPONSE DUE
Agent: David Champion
Status: Open
Priority: Low

...erdue by 14 days
OVERDUE
Agent: Bala Desinghu
Status: Open
Priority: High

Overdue by 14 days
CUSTOMER RESPONDED
Agent: Suchandra Tha...
Status: Open
Priority: High

...ot clear access_token co
OVERDUE
Agent: David Champion
Status: Open
Priority: Medium

...erdue by 18 days
...284
CUSTOMER RESPONDED
Agent: David Champion
Status: Open
Priority: Low

Overdue by 12 days

...user on the OSG XSEDE
OVERDUE
Agent: Lincoln Bryant
Status: Open
Priority: Low

...rdue by 18 days

...t on Palmetto #260
OVERDUE
Agent: David Champion
Status: Open
Priority: Low

...rdue by 20 days

#212
OVERDUE
Agent: Lincoln Bryant
Status: Open
Priority: Medium

...rdue by 23 days

Triage Lead actions

- Go to the **dashboard** first thing
- Check for new, unassigned tickets

openscience grid   help desk   OSG Helpdesk

| Dashboard | Tickets | Social | Solutions | Forums | Customers | Reports | Admin | + New | Q Search |

Ticket summary

Overdue	Open	On Hold	Due Today	Unassigned
10	21	7	0	2

click this for new or unassigned tickets

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200

Participate in Forums!
Answer 10 forum posts in a week to unlock the "Commentor" Badge and earn 200 Bonus points!
200

New Tickets ▾
Sorted by **Date Created** ▾

Showing **1 - 2** of **2** ◀ ▶

| ☐ | Pick Up | Assign to Agent | Close | Bulk Actions | Merge | Flag Spam | Delete | | Export |

☐ **OSG Connect jobs** #342
From: Lincoln Bryant
Created: about 2 hours ago, Due in 9 days

NEW

Agent: -
Status: Open
Priority: Low

☐ **Contact with UChicago** #323
From: David Champion
Created: 5 days ago, Due in 6 days

RESPONSE DUE

Agent: -
Status: Open
Priority: Low

New Tickets ▾

Sorted by **Date Created** ▾

Showing **1 - 2** of **2**   ◀ ▶

| | Pick Up | Assign to Agent | Close | Bulk Actions | Merge | Flag Spam | Delete | Export |

☐

OSG Connect jobs #342
From: Lincoln Bryant
Created: about 2 hours ago, Due in 9 days

NEW

Agent: -
Status: Open
Priority: Low

☐

Contact with UChicago #323
From: David Champion
Created: 5 days ago, Due in 6 days

RESPONSE DUE

Agent: -
Status: Open
Priority: Low

| | Pick Up | Assign to Agent | Close | Bulk Actions | Merge | Flag Spam | Delete | Export |

☐

OSG Connect jobs #342
From: Lincoln Bryant
Created: about 2 hours ago, Due in 9 days

NE

Agent: - ▾

☐

Contact with UChicago #323
From: David Champion
Created: 5 days ago, Due in 6 days

RESPONSE DU

Myself
✓ **None**

Bala Desinghu
David Champion
Emelie Harstad
Lincoln Bryant
Mats Rynge
Suchandra Thapa

Triage Lead actions

- Go to the **dashboard** first thing
- Check for new, unassigned tickets
  - Set Agent, Priority
  -

Triage Lead actions

- Go to the **dashboard** first thing
- Check for new, unassigned tickets
  - Set Agent, Priority
  - Modify ticket attributes
    - Estimate of "due" time when follow-up is required - to either user or agent
    - Optionally add a private note
    - tags: e.g. project, application, etc.
    - Optionally link to a Jira issue if prolonged technical work is needed

☆ ← Reply   → Forward   Add note   more ▾   Show Activities NO   ◀ ▶

Add a Note

Notify Agents: Emelie Harstad <eharstad@unl.edu> ×

B *I* U ☰ ☰ A A ⚯ 🖼 ⌫

0 Attachments:

✛ Attach a file

Add and set as **Pending**
Add and set as **Resolved**
Add and set as **Closed**
Add and set as **Waiting on Customer**
Add and set as **Waiting on Third Party**

Visible to the customer NO ⚙   Cancel   **Add Private Note** ▴

State is changed via the private note; add explanation. For new notes, perhaps add an internal message if relevant.

Triage manager actions

- Go to the **dashboard** first thing
- Check for new, unassigned tickets
  - Set Agent, Priority
  - Modify ticket attributes

- Check the Overdue queue
  - If a customer as responded to us, it usally means the ball is in our court:
    - a reply is due
    - problem solved ➜ **change state to resolved**
    - resolved issues convert to **closed** automatically

☐ | Pick Up | Assign to Agent | Close | Bulk Actions | Merge | Flag Spam | Delete | | Export

☐ **B** **held jobs** #317
From: Bing Xie (Illinois Institute of Technology)
Agent responded: 4 days ago, Overdue by 7 days
OVERDUE
Agent: Bala Desinghu
Status: Open
Priority: High

☐ **D** **feedback on tutorial/new user introduction** #316
From: Dane Skow
Agent responded: 1 day ago, Overdue by 4 days
OVERDUE
Agent: Suchandra Tha...
Status: Open
Priority: Medium

☐ **W** **input file size** #296
From: William Poehlman
Agent responded: 11 days ago, Overdue by 14 days
OVERDUE
Agent: Bala Desinghu
Status: Open
Priority: High

☐ **L** **multicore jobs** #295
From: Lee-Ping Wang
Agent responded: about 1 hour ago, Overdue by 14 days
OVERDUE
Agent: Suchandra Tha...
Status: Open
Priority: High

☐ **Re: Contact for CI Connect?** #284
From: David Champion
Customer responded: 20 days ago, Overdue by 12 days
🔴 CUSTOMER RESPONDED
Agent: David Champion
Status: Open
Priority: Low

☐ **B** **Re: Registering one more new user on the OSG XSEDE
submit host** #266
From: Bo Jayatilaka (Fermilab)
Agent responded: 26 days ago, Overdue by 18 days
OVERDUE
Agent: Lincoln Bryant
Status: Open
Priority: Low

☐ **Re: Returning to connect client on Palmetto** #260
From: David Champion
Agent responded: 21 days ago, Overdue by 20 days
OVERDUE
Agent: David Champion
Status: Open
Priority: Low

☐ **L** **Re: IP for OSG Connect Jobs** #212
From: Lincoln Bryant
Agent responded: 29 days ago, Overdue by 23 days
OVERDUE
Agent: Lincoln Bryant
Status: Open
Priority: Medium

There are actions indicated in each case.

This queue must be reduced to zero on a daily basis by the Triage manager.

Other Overdue queue requests

- That it is overdue tells us we need to do something, we **must** do something.
  - No simple answers
- Might require ping to agent
- Potentially reassign issue
- Potentially change the due date